

SmartStream Coordination Meeting Minutes
February 10, 2004
(Postponed from 2/3/2004)

Attendance: Sophia Bedard; Pete Bostian; Ron Brown, Ken Dinsmore, Mel Lambert, Cathy McClintock, Jim Racheff, Mark Testerman

1. SmartStream Update 6.5.03: Pete reported that the 6.5.03 update and the follow-up cumulative update have been applied. Mel Lambert has been testing the updates and has discovered some problems with requisition approvals and receipt entry. Sophia also found out that the invoice approval process does not work either. We are checking into these problems and hope to resolve these issues soon and then update the production system.
2. Data Archive Status: We have completed our initial data archive through FY 2001. We will probably be archiving a year of data on an annual basis. We will review the archive procedures prior to Al Butler's retirement later this year.
3. DOIM/D&B Data: The DOIM D&B historical financial data of concern has been archived to tables contained in the SmartStream server. We should not have to retrieve any data from the DOIM computer to satisfy inquiries or audits. Pete noted that DOIM has received a new, smaller, IBM computer that will be used to support the remaining NCI-Frederick production systems until they can be migrated or replaced by systems operated on our own computers.
4. SmartStream Doc Attach: Although this procedure works for Pete on his computer, other users are incurring problems. Pete checked out the procedure and documented it in 2002 and cannot explain why it does not work properly at sites other than the C&SS network. C&SS will work on the problem after the SmartStream updates have been installed onto the production system.
5. Purchasing Work Flow Modifications: Pete, Sophia, Mel and Randy met with Purchasing regarding their request for changes to the requisition approval workflows. Implementing the changes would involve an overwhelming number of approval routing combinations. Purchasing was asked if the number of conditions and/or routes could be reduced. We will wait to hear further from Purchasing on this issue.
6. P-Card: Lori Smith has indicated that all the users are in the new system although there are still some users that have not reconciled all their data in the old system. She will encourage them to do so and then the old system can be terminated. Pete reported that the Pcard receiving process has been extensively modified to better accommodate the procedures used at the NCI-Frederick. He also noted that we are creating web reports in the system so that separate Access reports will not be required.

7. SmartStream Receiving Notification to FME: Ron Brown reported that he is waiting for FME to review the proposed procedure that would be used within SmartStream to notify FME when receiving needs assistance to deliver or install an item.
8. Return of Goods Form: Ron Brown stated that users seem to be satisfied with the web Return of Goods form and that it is not necessary to populate the form with SmartStream data at this time.
9. Mali Data: Pete stated that data involving purchases for the Mali project have been extracted from SmartStream and Pcard. This table will be used by our Web Development group to develop an application for the project staff that will show the status of the orders, allow them to add comments and track receipts.

The next meeting will be held Tuesday, March 2, 2004, at 9 AM in the Building 362 Conference Room.